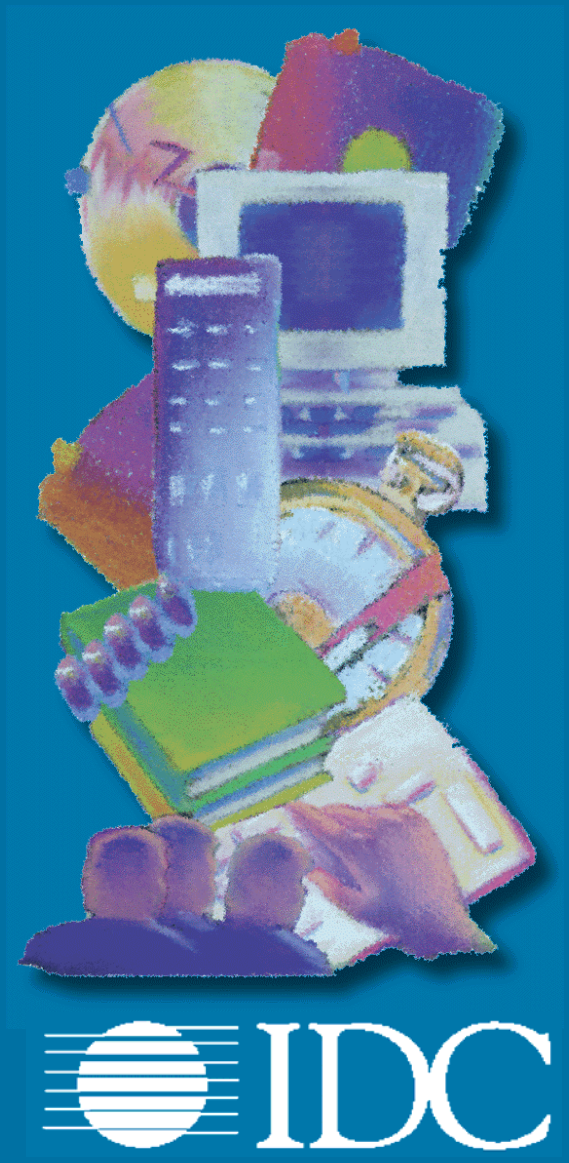


Collaboration

Technology and Market Dynamics

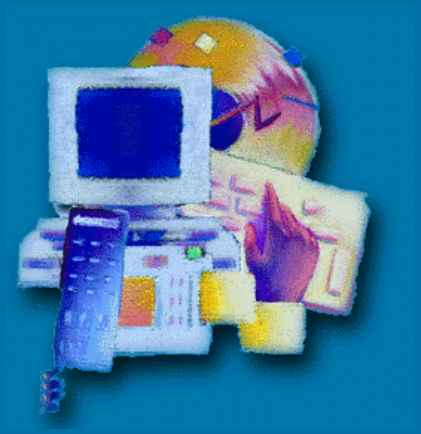
DARPA June 1997

Ian Campbell

Director,

Collaborative and Intranet Computing

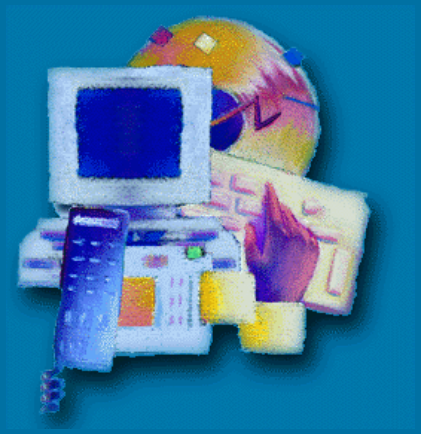
International Data Corporation • 5 Speen Street, Framingham, MA 01701



Topics

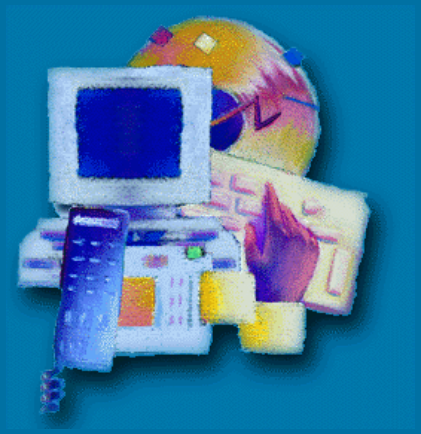
- What is Groupware?
- Intranet Effect
- Market Vendors and Dynamics
- Groupware Future

IDC



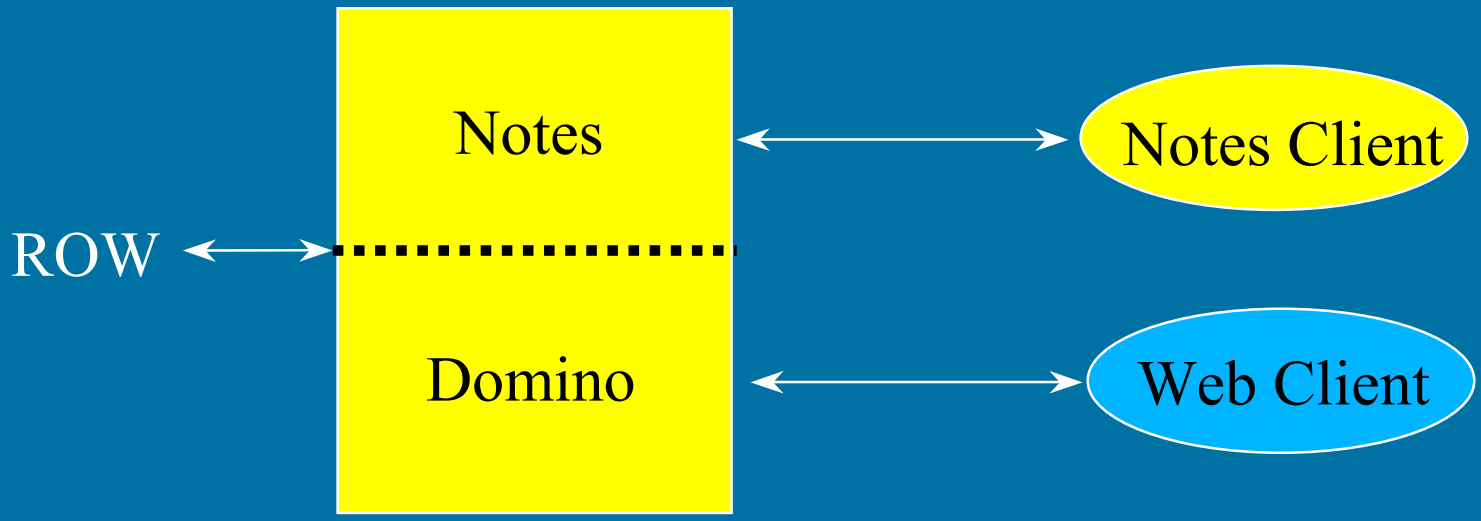
Groupware has been around for 8 years.

What is it?



Groupware - The Lotus View

Collaboration, communication, coordination



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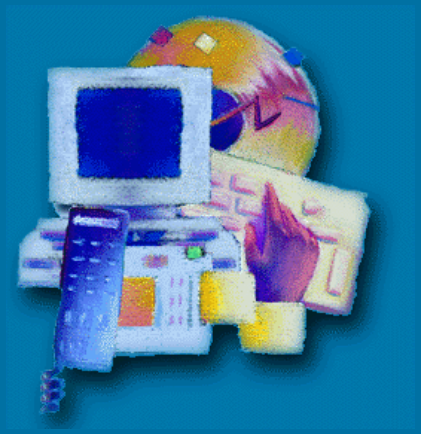
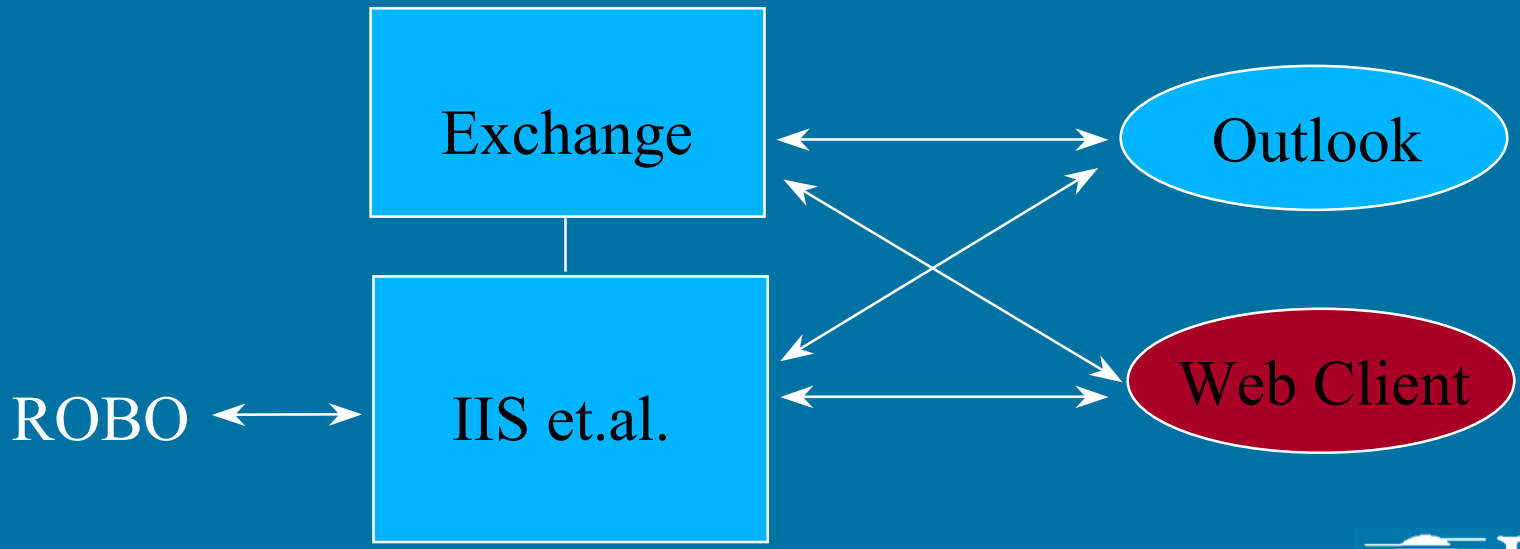


Groupware - The Microsoft View

Advanced messaging -

As long as it it part of Back Office; runs on NT; is integrated with IIS, SMS, SQL Server; and you pay us.



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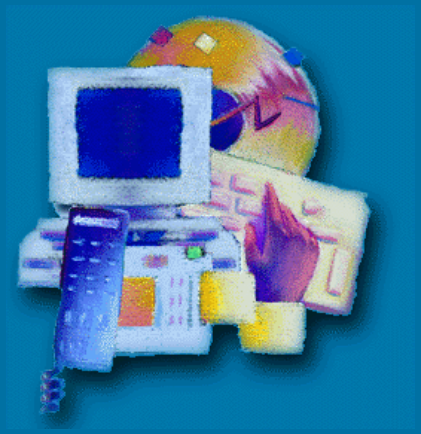
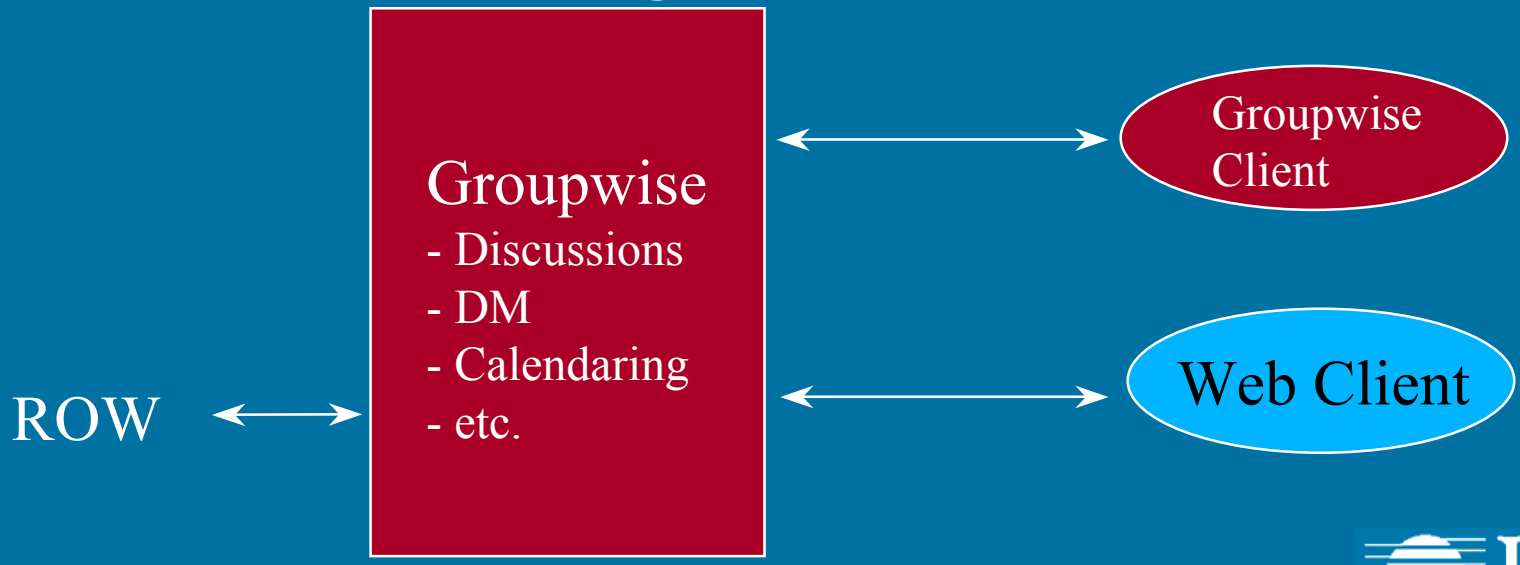


Groupware - The Novell View

Threaded discussions, document management, workflow, searching, calendaring and scheduling, information sharing, etc.



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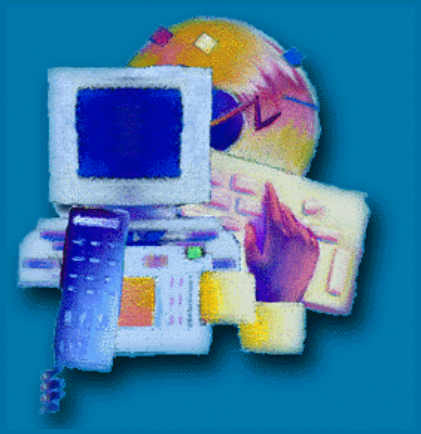
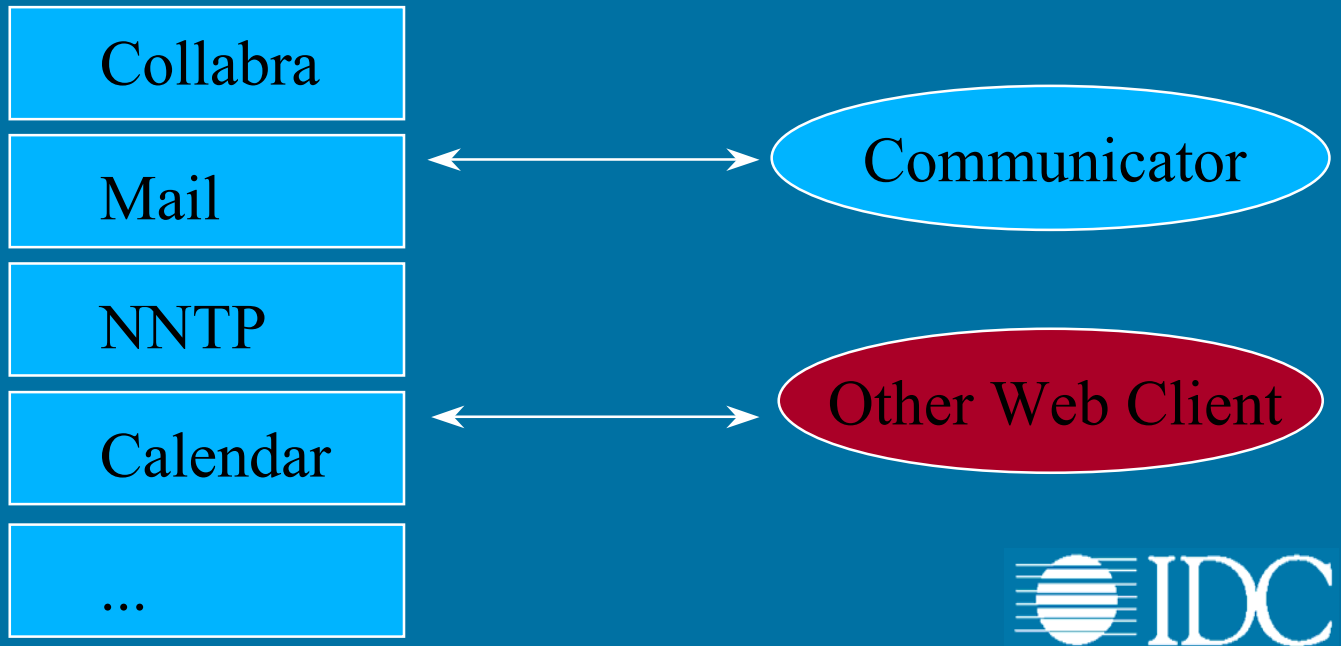


Groupware - The Netscape View

What we sell (and we're open)

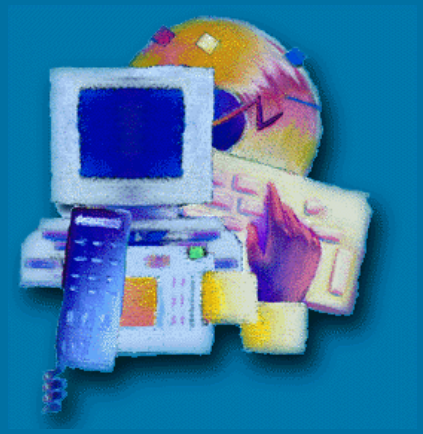


IDC

IDC's Definition of Groupware

- The technology and human processes needed to create a collaborative work environment.
- Three components of groupware:
  - Collaboration
  - Workflow
  - Knowledge Base

IDC



Three Components of Work

Knowledge Base

Ad-hoc and Structured
Stores of Information

TASK!

TASK!

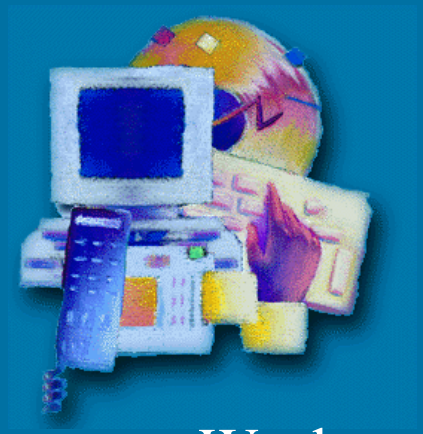
Workflow

Administrative and
Mission Critical

Collaboration

Ad-hoc and formal
- E-mail
- Discussion Databases
- White-board Technology

IDC

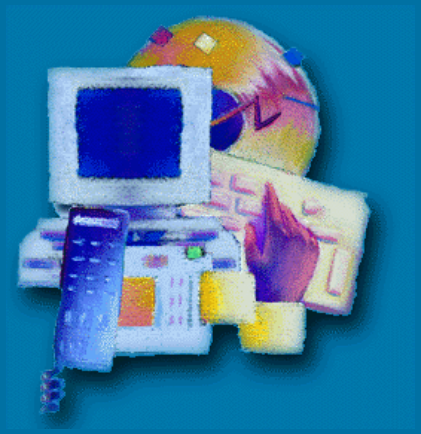


Applying the Three Components

Workers use groupware to different degrees depending on their job requirements:

	Collaboration	Workflow	Knowledge Base
Accounting	10%	50%	40%
Sales Force	85%	10%	5%
Marketing	55%	15%	30%

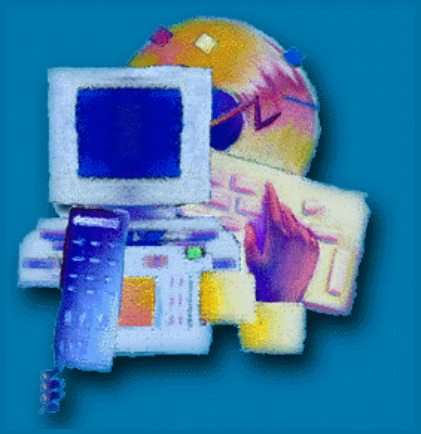
IDC



Traditional Groupware

- Lotus Notes
- IBM OfficeVision
- Microsoft Exchange
- Novell Groupwise
- ICL TeamWare
- Mesa Conference+
- Oracle InterOffice

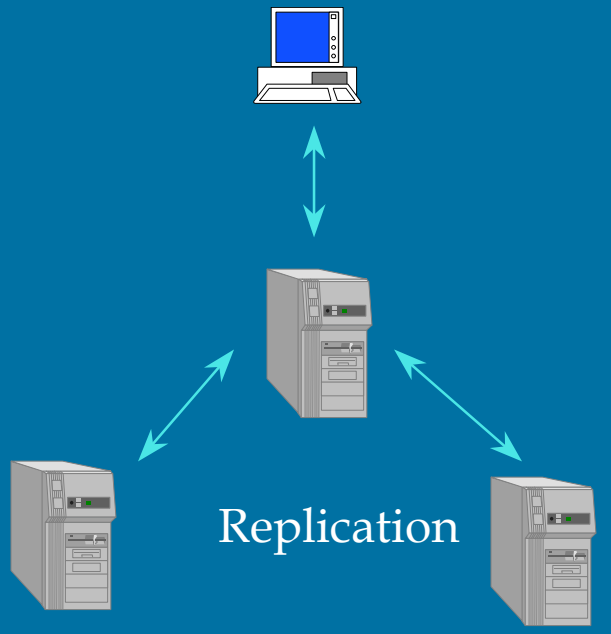
IDC



Network Based Groupware

Network Centric

- LAN based
- Replication
- High administration
- Secure
- Reliable
- Cost-to-use (1:5)



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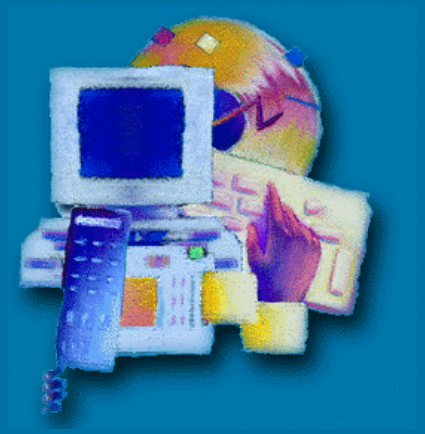
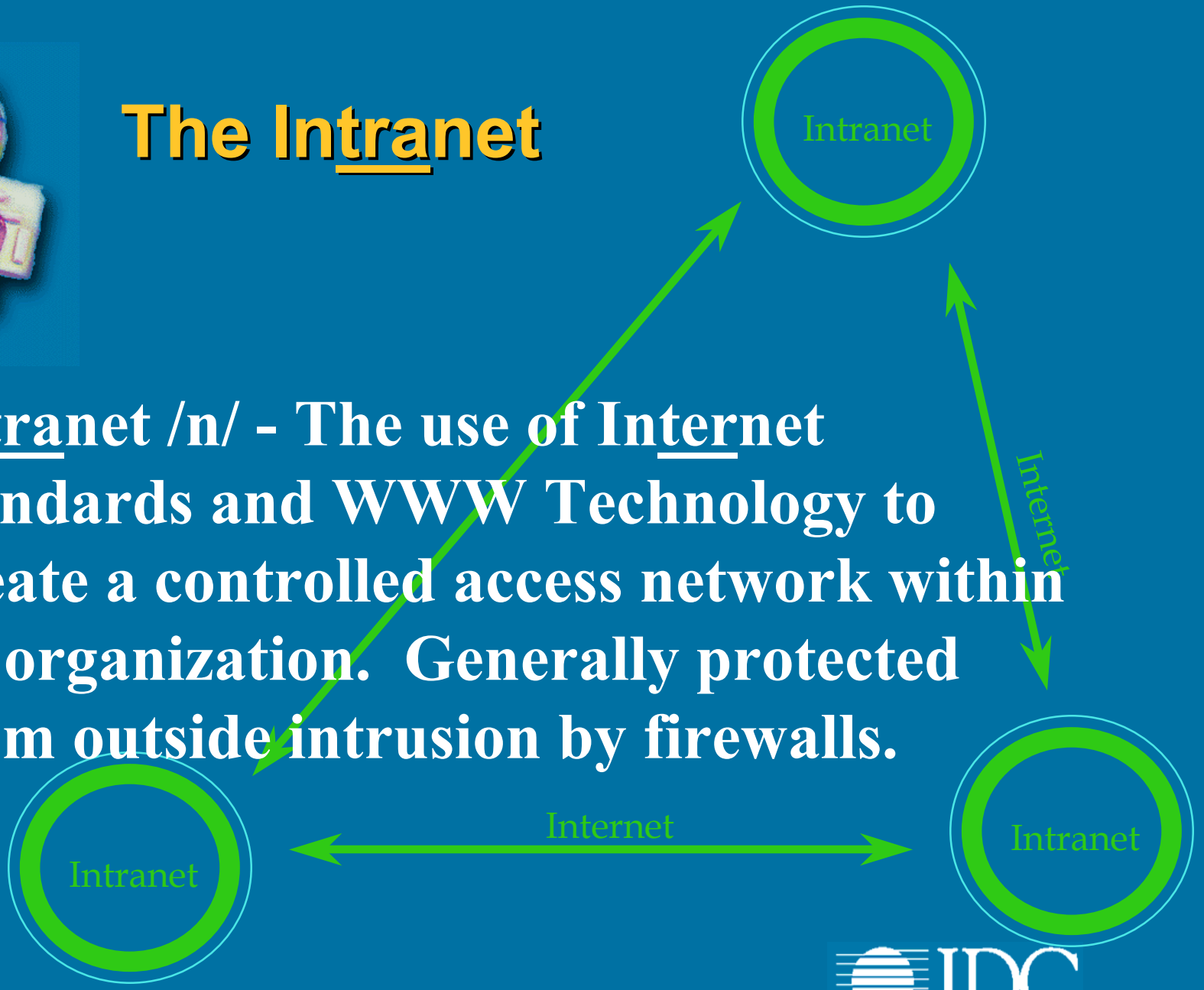
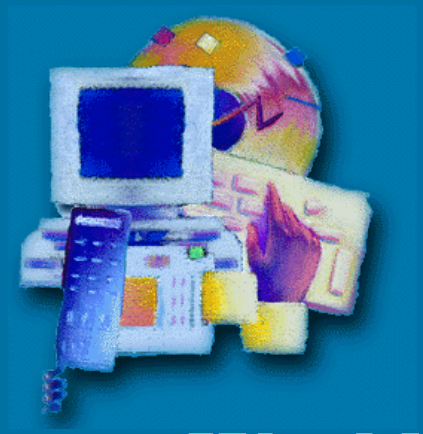


The Intranet



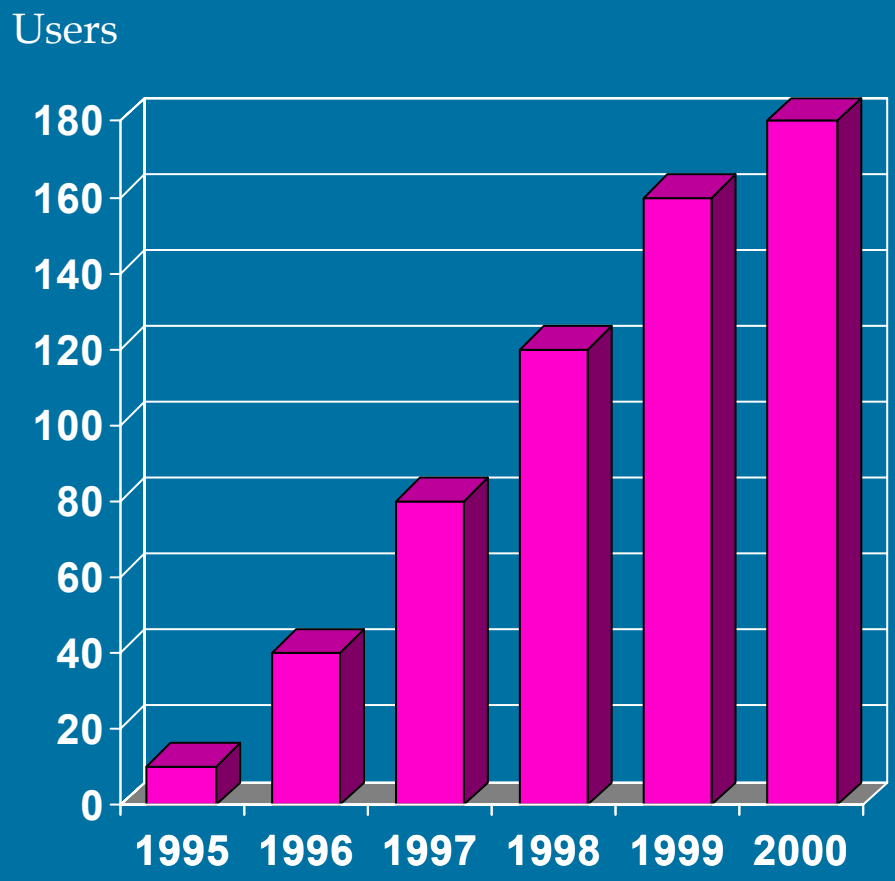
- **Intranet /n/ - The use of Internet standards and WWW Technology to create a controlled access network within an organization. Generally protected from outside intrusion by firewalls.**

IDC



Web Browsers 1995 - 2000

- **Worldwide Web browser use will grow from 10 million to over 180 million by the year 2000.**

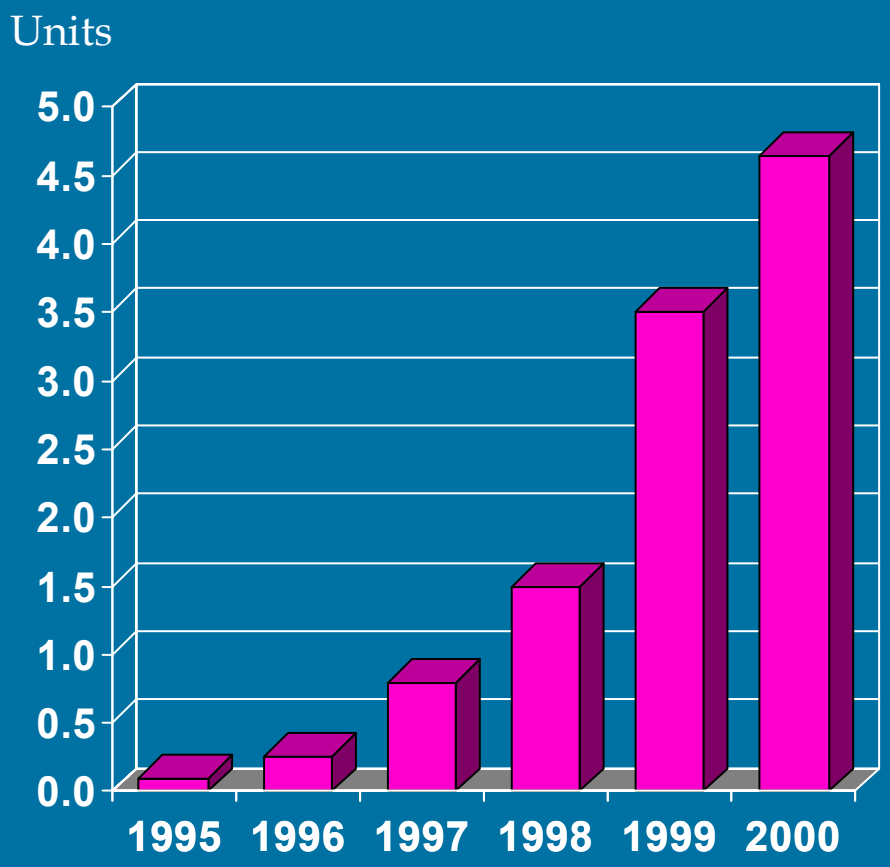


Source: IDC, December 1995

IDC

Intranet Web Servers 1995 - 2000

- Worldwide Intranet focused Web servers will grow from 100,000 to over 4.7 million by the year 2000.



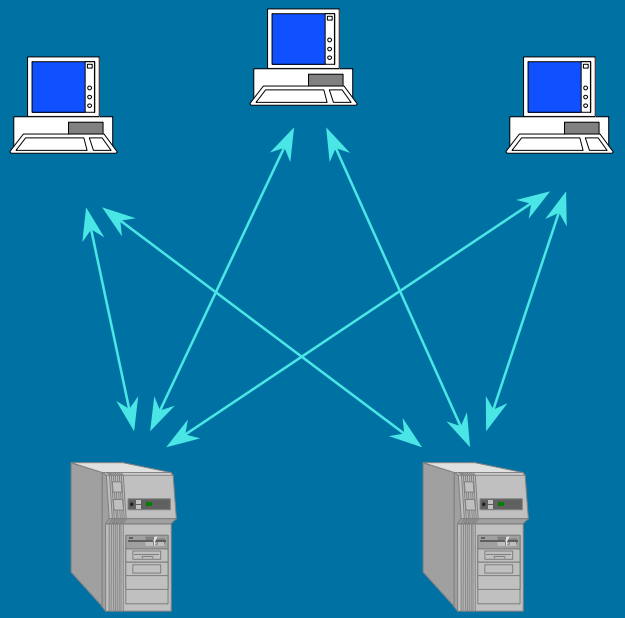
Source: IDC, December 1995

IDC

Intranet Foundation to Groupware

Intranet Centric

- Web based
- Limited replication
- Moderate administration
- Secure
  - Intranet - Yes
  - Internet - Yes/No
- Network dependent



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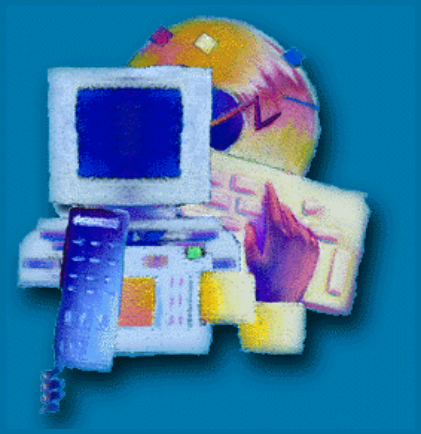
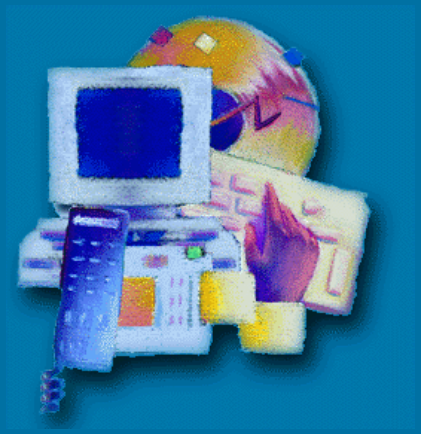


Intranet Groupware

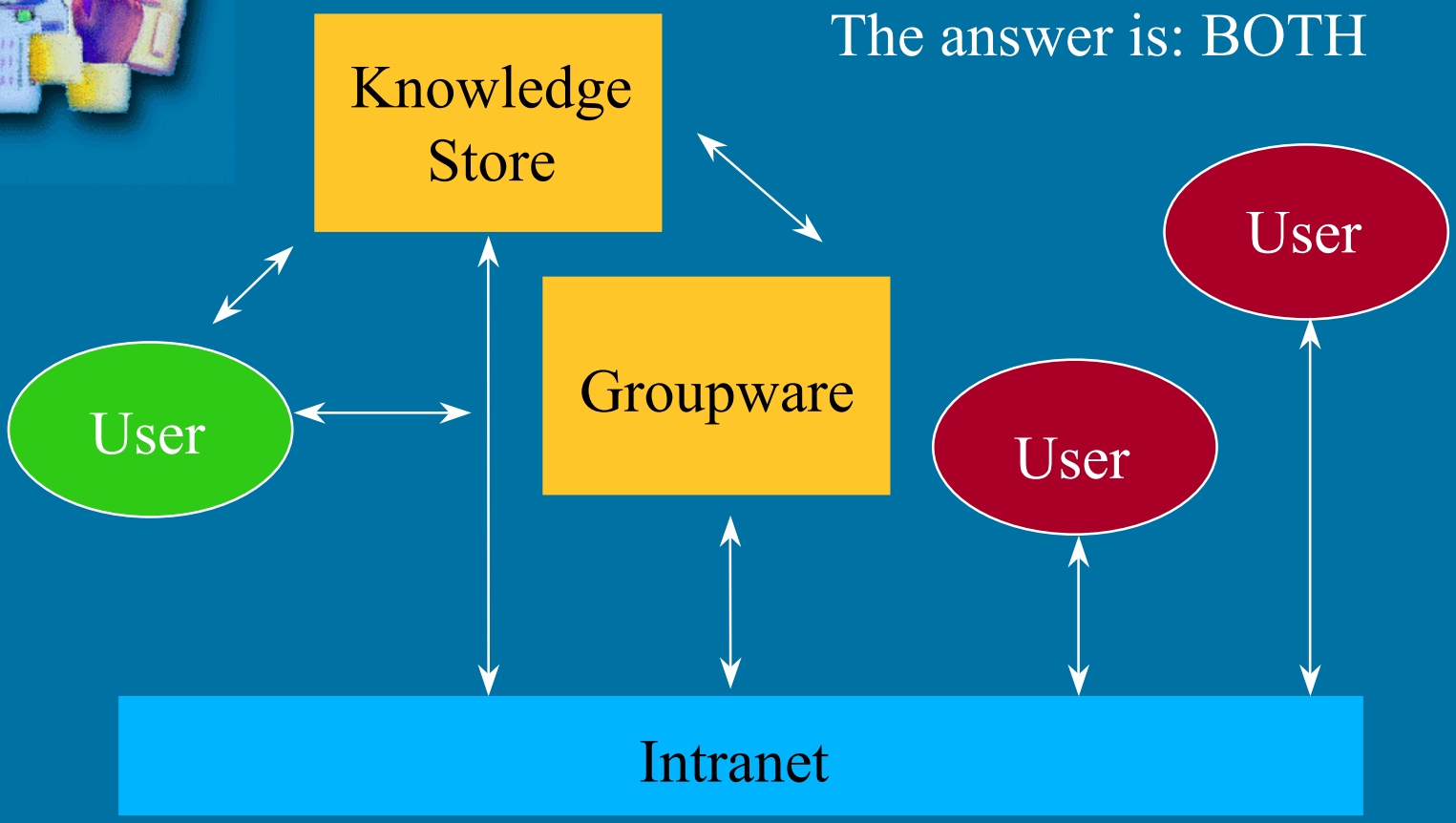
- Netscape Collabra
- Open Text Livelink Intranet
- Radnet Webshare
- IntraActive
- Many others in development...

IDC



Intranet and Groupware

The answer is: BOTH



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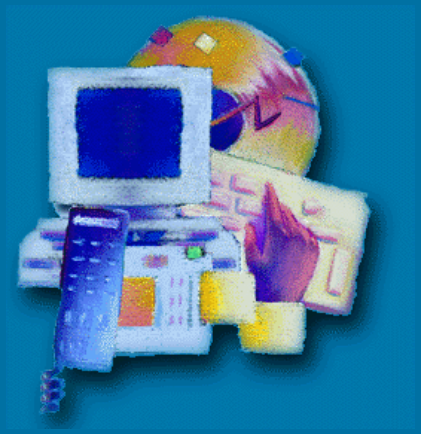
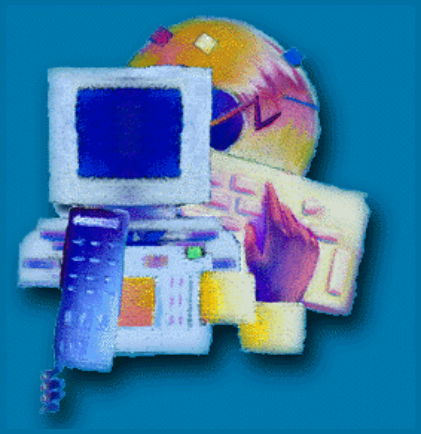


Key Technology Points:

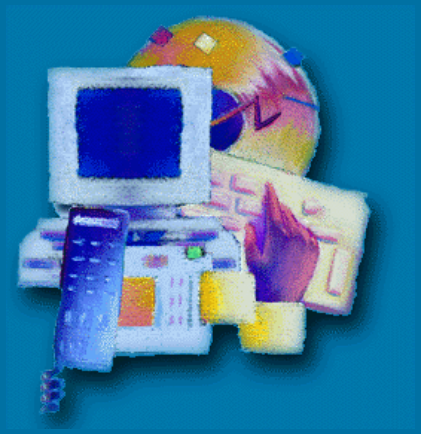
- Use the three component view of groupware
- Match the tool to the use
- The Intranet is a foundation for a groupware application -- it is not groupware.
- *All groupware will be intranet enabled*

IDC



The Groupware Vendors and Market

IDC



Collaborative Application Market

- Integrated Collaborative Applications
  - Information Sharing
  - Electronic Conferencing
- Document Management
- Workflow
- Group Calendaring and Scheduling

IDC

Groupware Use

e-mail

Knowledge Management

Workflow

Information Sharing

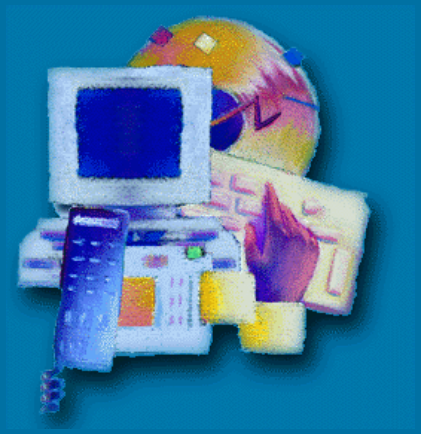
Collaboration

Static Publishing

User Base

Human Factors

IDC



Integrated Collaborative Environments

	Technology Leading	Technology Open	Company Strategy	
*Lotus/IBM	A	A	A	- Market leader
*Netscape	A-	A	A	- The internet experts
*Open Text	A	A	A	- Leading EDM/WF
Novell	B	A-	B-	- Struggling (*Novonix?)
*Microsoft	B+	B	A-	- Still clarifying message/position
SoftArc	B+	A	B	- Second tier - messaging focus
ICL TeamWare	B	B	B	- Good product outside US
Uniplex	B	B	B+	- May be interesting in future
Oracle Office	B	B	B	- Lack of sales limits future
Digital	C	C	C	- Mainframe solution OK - but
*Radnet	A	A	A	- Very interesting dev. env.

* potential expert panel partner

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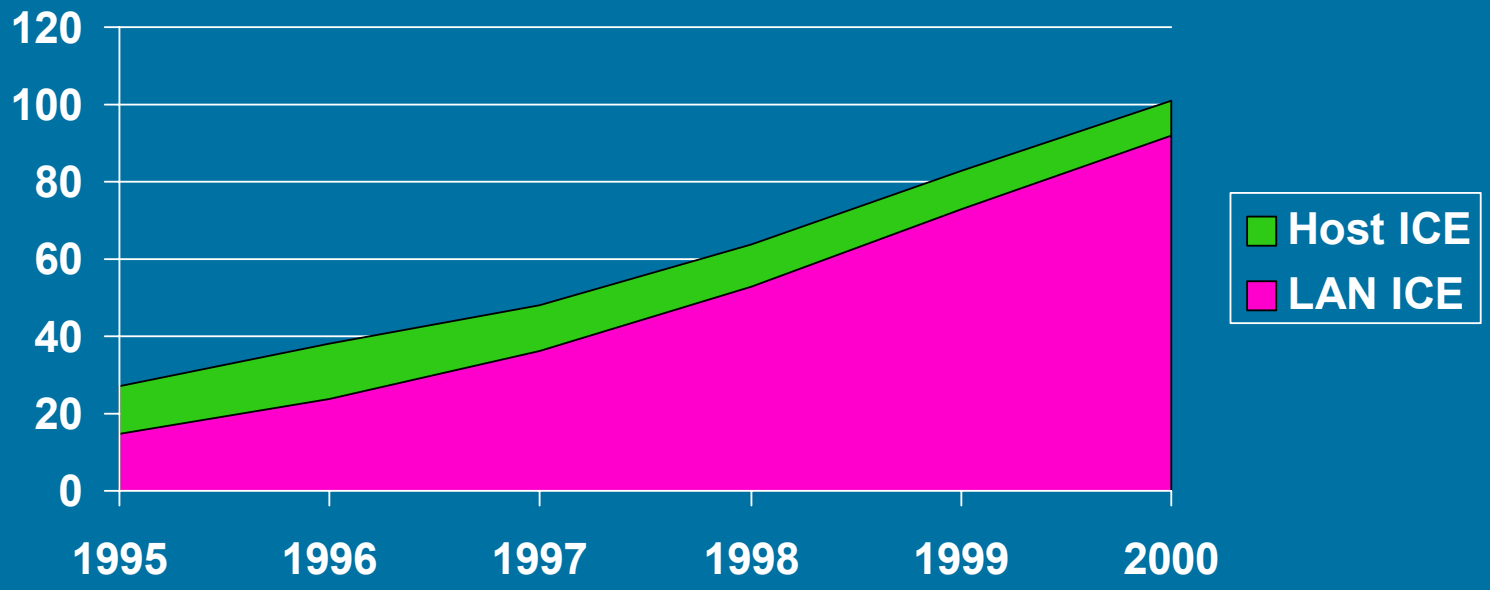
User Growth

Total ICE Installed Base of Users 1995 - 2000 (M)



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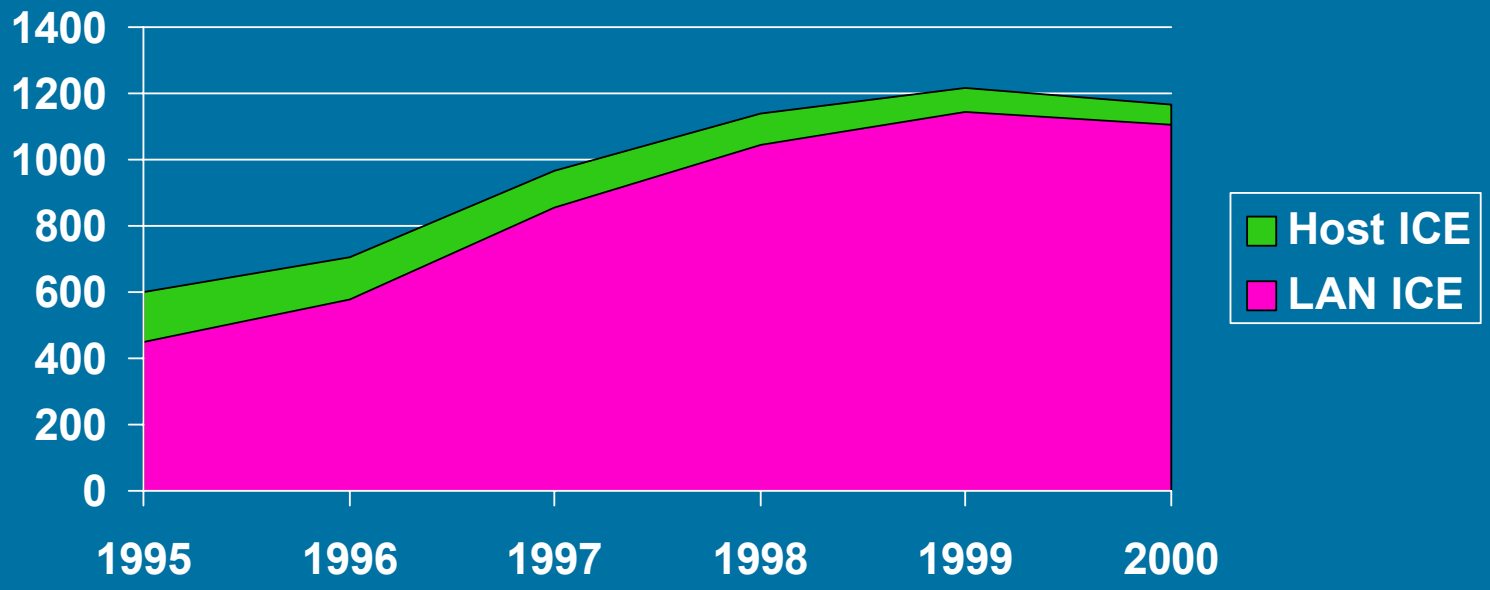
ICE Revenue Growth

Total ICE Revenues 1995 - 2000 ($M)



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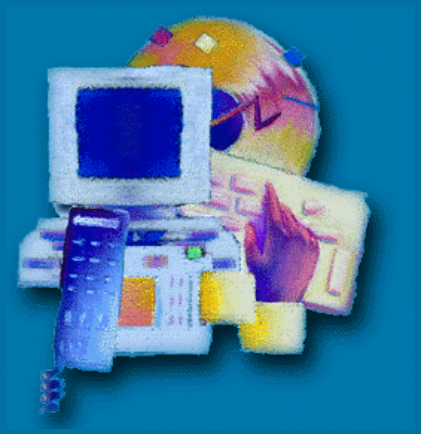
ICE Drivers

- The migration of messaging to ICE products as the underlying infrastructure
- Recognition of human barriers
- Internet driving deployment within and outside the corporation
- Top four (Lotus/Microsoft/Netscape/Novell) squeezing second tier into niche areas.
- Competition driving ASP down and functionality up.

IDC



Document Management

	Technology Leading	Technology Open	Company Strategy	
*Open Text	A-	A-	A	- Leading and partnering w/others
*Documentum	A-	B+/A-	A-	- Strong strategy - the one to watch
*Novasoft	A	A+	A	- New company and direction!
PC DOCS	B+	B+	B+	- Strong player
IDI	B-	B-	C	- Greatest number of users
Uniplex	B	A-	C	- In evolution for EDM
Interleaf	B	B	C	- Re-inventing itself
Saros (Filenet)	C+	C+	C-	- Still in transition
Novell	B	A-	B-	- Softsolutions with GroupWise

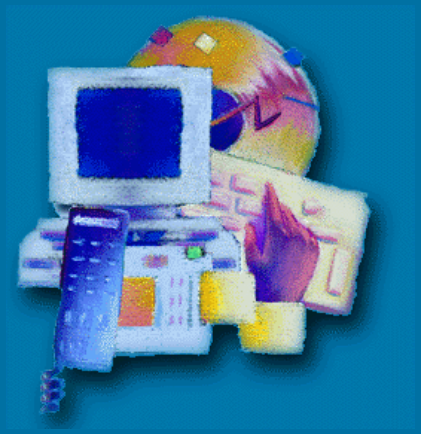
* potential expert panel partner

IDC

Document Management Drivers

- Intranet bringing document management from specialized department to the masses.
- The web is made up of documents!
- EDM not trivial enough to be simply included with groupware - will remain as a distinct space.
- EDM and top four partnerships
- Traditional players (Documentum) may be caught on the wrong side of the ASP war.

IDC

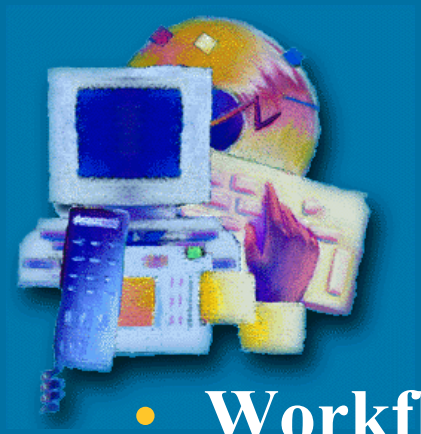


Workflow

	Technology Leading	Technology Open	Company Strategy	
*Keyflow	A	A	A	- Mid tier full functioned WF
Filenet	B	B	B	- Market leader in mid tier
*Jetform	A-	A	A-	- The key player in routing space
Banyan	C	C	F	- Number 2 in users in routing
Action	A	B+	A	
Reach	B+	B+	B	
Formtek	B	B	B	

* potential expert panel partner

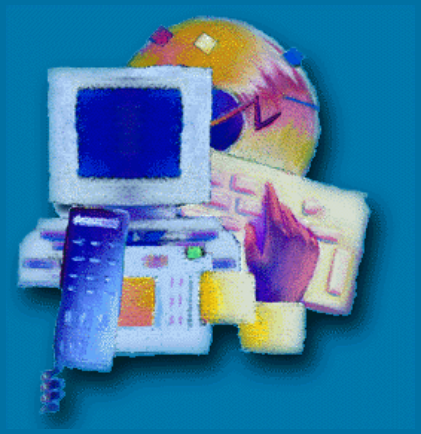
IDC



Workflow Routing Drivers

- Workflow still the last area to be recognized
- Directory services key to the future
- Partnerships with ICE vendors
- Functionality being included with ICE/EDM
- A very hot area in 1998 - 2001
- Applications must be made easy to design/use

IDC



Group Calendaring and Scheduling

	Technology		Company	
	Leading	Open	Strategy	
Microsoft	B+	B+	A	- Market leader
*Lotus/IBM	A	A	A	- Aggressive, strong growth but #2
*Franklin Quest	B-	B-	A	- Range from paper to electronic
Now Software	B	A-	B	- Great second tier solution
On Technology	B	B	B	---- Second tier ----
CS+T	A-	B	A-	
Campbell	A-	B	B	
Microsystems	A-	B+	B	
CE Software	A-	A-	A-	
Crosswind	B	B	B	

* potential expert panel partner

IDC

Group Cal. and Sched. Drivers

- Human factors delay implementation
- Seen as part of groupware but rarely implemented
- Often free -- ASP - $5
- Second tier trying to find new areas to exploit
- Lackluster segment that will show moderate growth.

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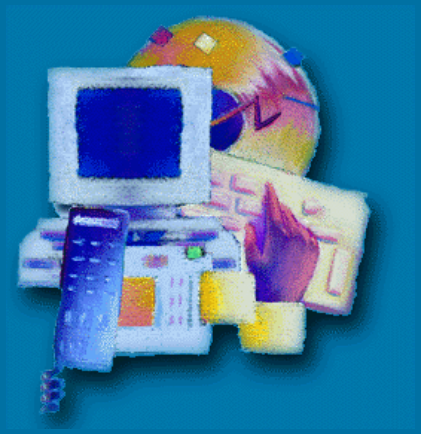
Groupware Future

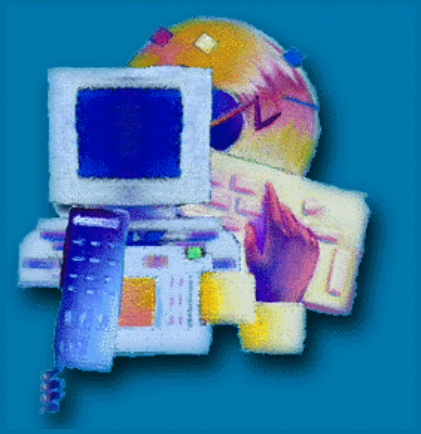
- Searching (adaptive)
- Knowledge management
- Tactical solutions
- Management at the manager level
- Vertical/industry focus
- Workflow

IDC



Human factors are the key

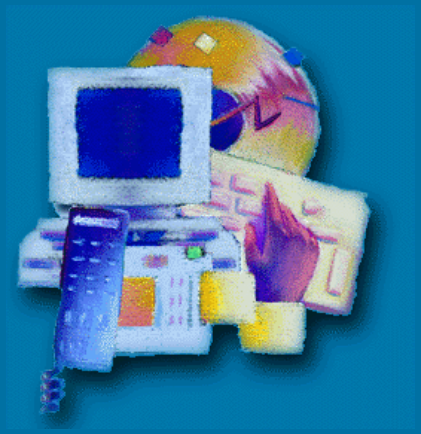
If the employees won't use it, the ROI will be negative



Summary

- Groupware is the primary intranet application and will show very strong growth through 2001.
- Collaboration will become a common part of the work environment.
- Limited number of key expert panel partners - but -
- competition will drive innovation and the search for new technology.

IDC



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